



# FedVTE Community Manager Guide

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## 1 INTRODUCTION

Each organizational unit that uses FedVTE has its own community. Just like the real-life organizations they represent, communities

- Are nested into hierarchies
- Have members
- Are administered by one or more managers responsible for maintaining the community and its users

Organizations, including their members, that existed in cert.org VTE were migrated into FedVTE and are called communities. Community Managers will have tasks available to them to manage their communities. This guide details those tasks.

Notes about communities and Community Manager (CM) assignment:

- A user that was an Organizational Administrator in cert.org VTE will be a CM of that community in FedVTE.
- If a CM transfers to a new community, they then become a CM of the new community
- A CM of a community or parent community can assign the CM role to any user within its community, or child communities
- If a user was part of several organizations in cert.org VTE, their account will be placed in the Orphans community until assigned or invited to another FedVTE community

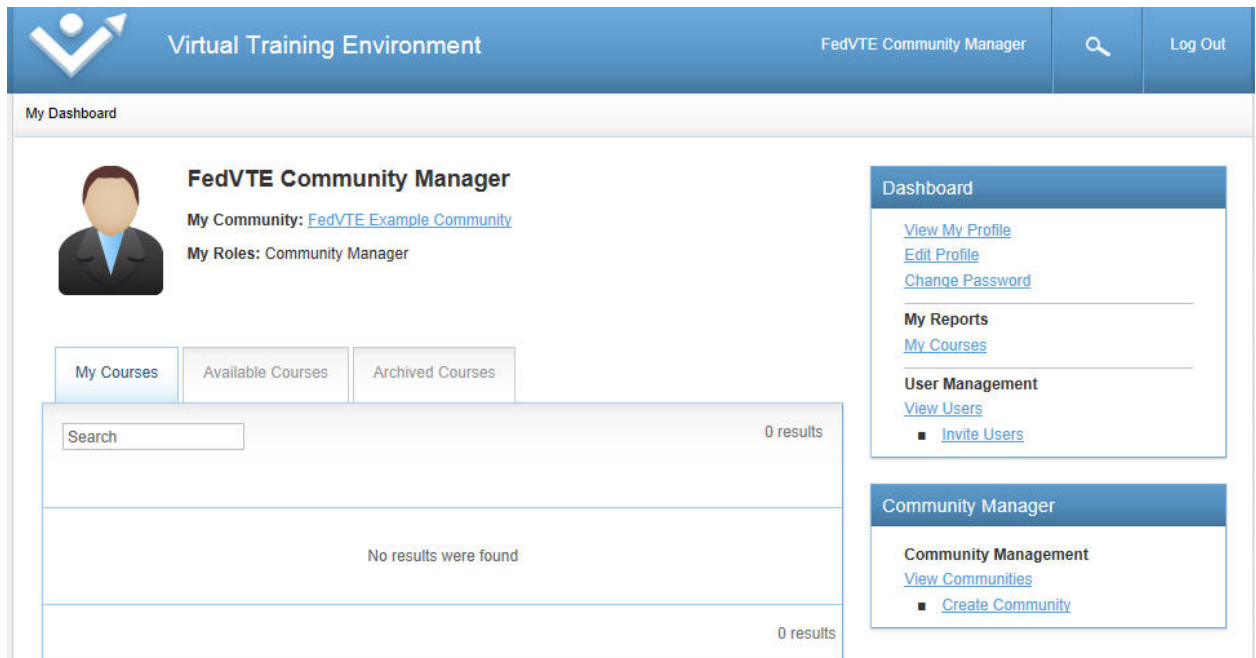
This manual is written from the perspective of a CM for a parent organization with no additional roles such as Administrator or Training Advisor (TA) assigned.

Important: It is recommended that all CM users are also give the TA role. The TA role is required for users that will need to access community, course, and user reporting features. Details regarding these reports are available in the *Training Advisor Guide*.



## 2 COMMUNITY MANAGER HOME PAGE

To perform community management tasks, a user with the assigned Community Manager (CM) role will log into the system and find the Community Manager task box under the Dashboard action panel on the right of their home screen.



To return to this screen from any other part of the system, click the Virtual Training Environment text in the panel at the top of the screen.

Next to the user image icon and under your name, you will find information specific to your user account.

- **My Community** – The community in which you are a member
- **My Roles** – Role(s) your account has been assigned in your community (or system if Admin is designated)

The tabs in the middle of the home screen pertain to your account's course information in FedVTE.

- **My Courses** – Courses you are currently enrolled in
- **Available Courses** – Courses available to members of your community
- **Archived Courses** – Courses you have archived



The sidebar on the right – the Action Panel – contains links to tasks your user account can perform in the system. The Dashboard task box contains tasks related to your user account.

- **View My Profile** – View the details of your profile
- **Edit Profile** – Change or add information to your profile
- **Change Password** – Reset the password for your user account
- **My Reports**
  - **My Courses** – Progress reports for the courses you are currently enrolled in

The User Management section of the Dashboard contains links to manage users within your community.

- **User Management**
  - **View Users** – View all users that are members in the community
  - **Invite Users** – Invite user/s to join the community

The Community Manager task box in the Action Panel contains links to tasks available to CMs to manage their communities.

- **Community Management**
  - **View Communities** – Lists the parent and child communities where you have the CM role
  - **Create Community** – Create a new child community within your community

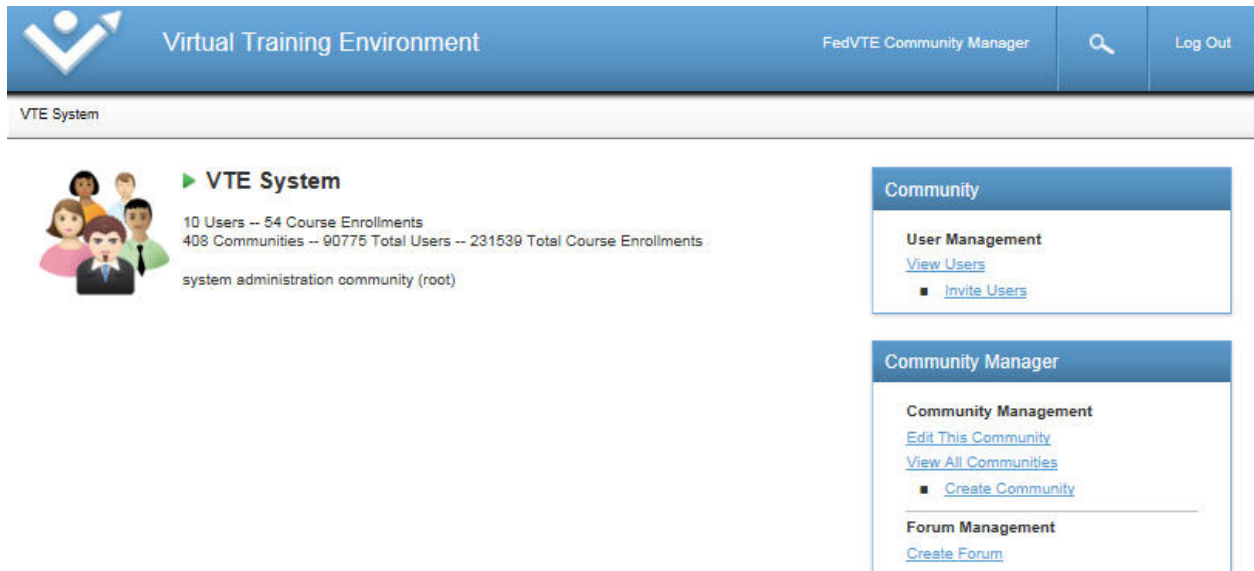


## 3 MANAGE A COMMUNITY

There are several options available for a Community Manager to customize their parent and child communities to best serve their organization's structural needs.

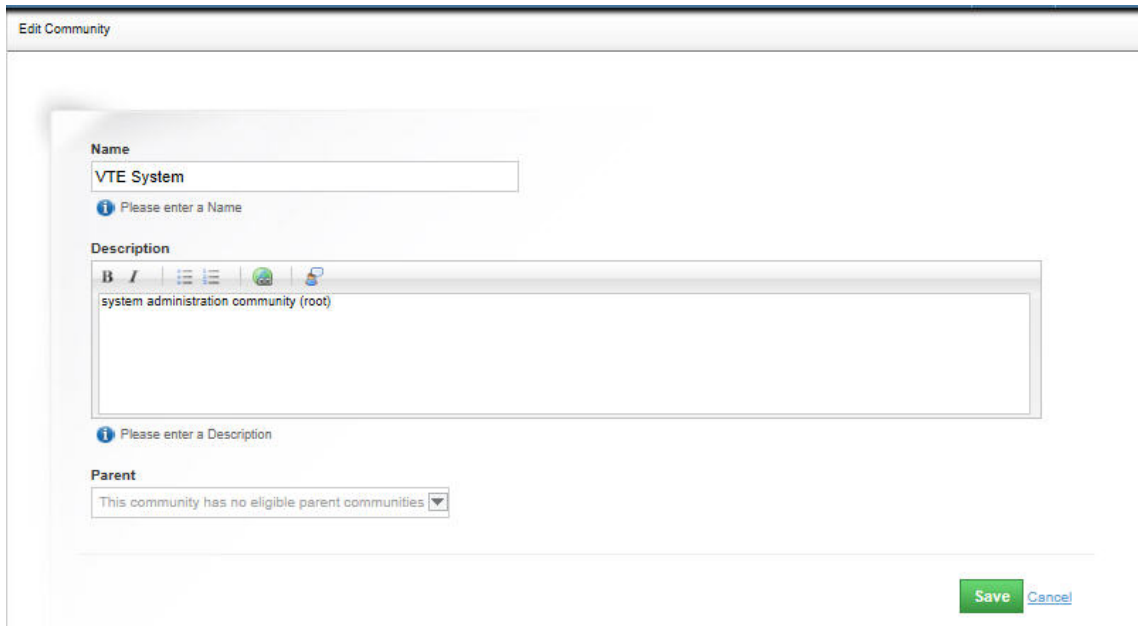
### 3.1 Edit a Community

1. Click the name of your community next to the *My Community* label on the home screen.
2. This takes you to your community home screen where you will see community details and also notice additional community management options in the Community Manager task box.



3. Click the *Edit This Community* link in the Community Manager task box in the Action Panel.

The Edit Community screen will open displaying current information about the community.




4. The CM can edit the following community attributes:

- **Name** – The name of the community
- **Description** – A description of the community
- **Parent** – Select a parent a community


Note: As this is the parent organizational community, this option is greyed out with a message indicating no parent community is available.

The next option available on the community details page in the Community Manager task box is *View All Communities*. Clicking this link will display a searchable list of all communities within your organization.



 Virtual Training Environment

FedVTE Community Manager






Log Out

Community Management

Search

Search

3 results  
Pages: 1

	<a href="#">Example Consultant Community</a> Child of Example FedVTE Community	<a href="#">Edit This Community</a>
	<a href="#">Example Management Community</a> Child of FedVTE Example Community	<a href="#">Edit This Community</a>
	<a href="#">FedVTE Example Community</a> Example FedVTE Community	<a href="#">Edit This Community</a>

3 results  
Pages: 1

From the community listing screen, you can edit the properties of any of the communities by clicking the *Edit This Community* link.

Clicking the community name link of any of the communities will open their respective details home page where community and user management tasks as described in this manual may be performed.

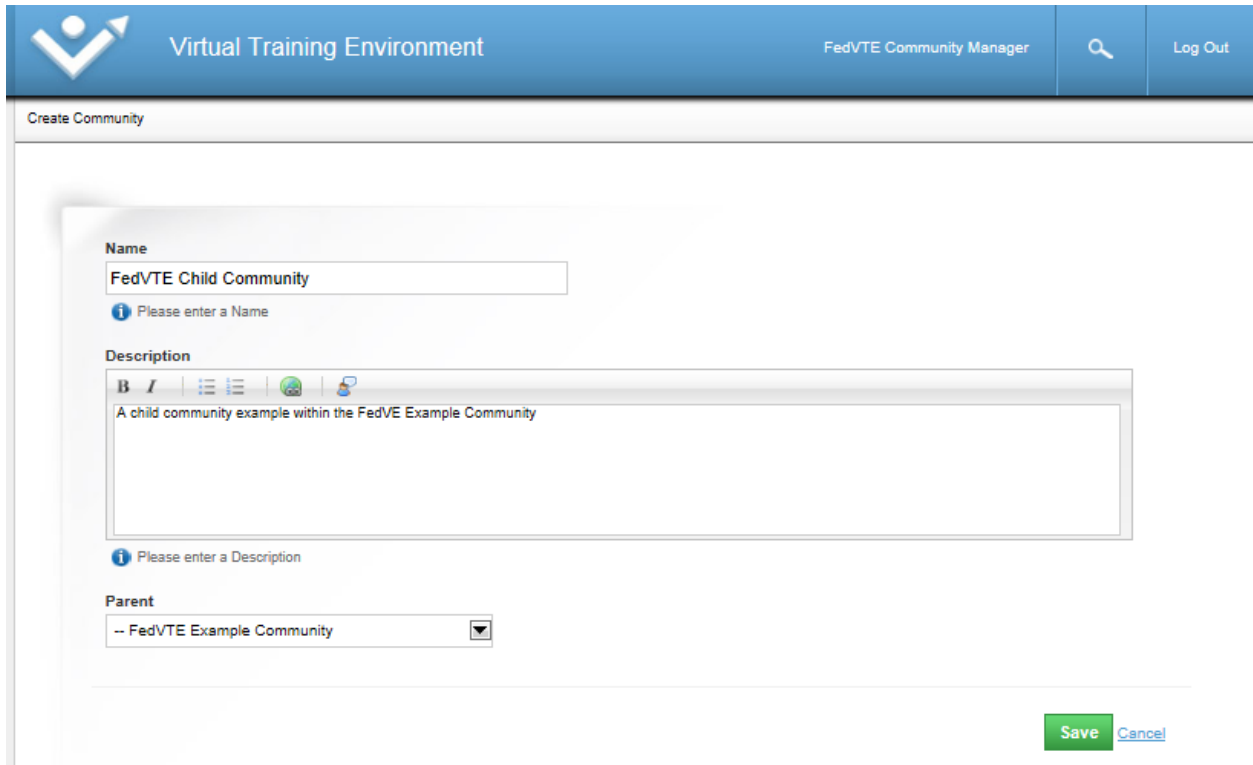
## 3.2 Create a Child Community

The CM may create child communities within their parent community

1. Click the Virtual Training Environment text in the panel at the top of the screen to return to the home page.
2. Click *Create Community* in the Community Manager section of the Action Panel.



3. The Create Community screen opens.



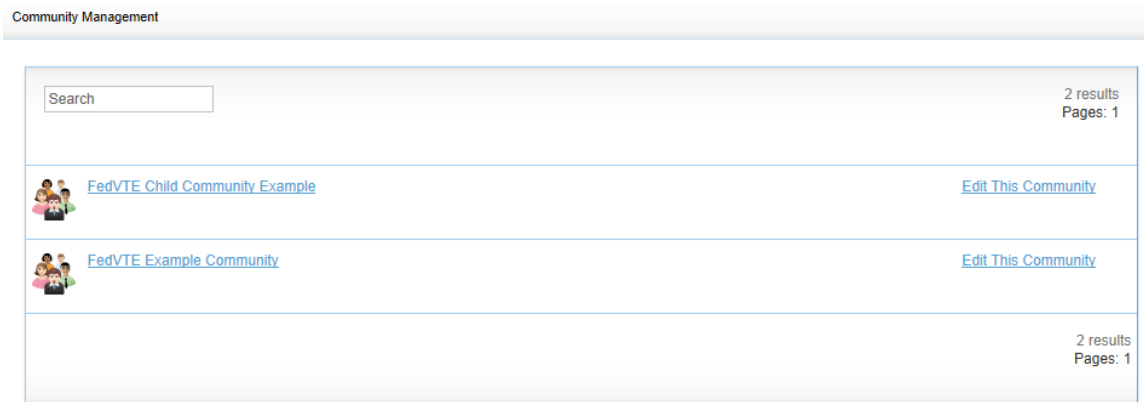
4. Enter the following:

- **Name** – A unique name for the new child community
- **Description** – Add a description for the new child community
- **Parent** – Use the drop down list to select a parent community. By default the new community will be a child to the parent community where you have the CM role.

5. Click Save when you have finished entering information for your child community.

### 3.3 Manage a Child Community

1. Click the Virtual Training Environment text in the panel at the top of the screen to return to your home screen.
2. Click *View Communities* in the Community Manager section of the Action Panel.
3. The next screen, the Community Management screen, displays a list of the communities you manage.



4. Scroll down to find the child community, or type the name of a child community in the *Search* box under the Community Management heading to locate a community.
5. Click the *Edit This Community* link next to the child community's name you wish to edit.


You will be brought to the Edit Community screen detailed previously.

### 3.4 Delete a Memberless Child Community

1. Click the Virtual Training Environment text in the panel at the top of the screen to return to the home page.
2. In the Community Manager section of the Action Panel, click *View Communities*.
3. The next screen, the Community Management screen, displays a list of the communities you manage.
4. Scroll down to find the child community you wish to delete and select it, or type the name of the child community in the *Search* box under the Community Management heading and select it.

- When you click the child community's name, the child community's home screen opens.

FedVTE Example Co...
FedVTE Child Community Example



► **FedVTE Child Community Example**

0 Users -- 0 Course Enrollments  
1 Community

**Community**

---

**User Management**

[View Users](#)

■ [Invite Users](#)

**Community Manager**

---

**Community Management**

[Edit This Community](#)

[Delete This Community](#)

[View All Communities](#)

■ [Create Community](#)

- Select the *Delete This Community* link to delete this community.

**Note:** Only communities that do not contain users will have the *Delete This Community* link in the Community Manager task box.

- You will be asked to confirm the community deletion. Select *Delete Community* to continue with delete, or click *Cancel*.

Delete Community

Are you sure you want to delete the following community?

Community Name: FedVTE Child Community Example

Delete Community
[Cancel](#)

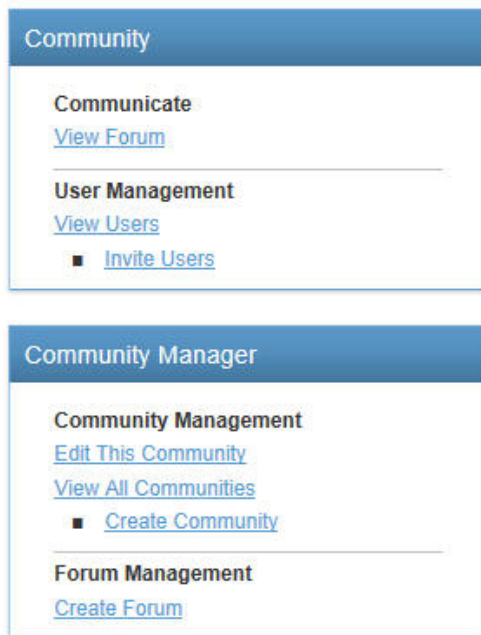
## 3.5 Create a Community Forum

A Community Manager may create a forum to post information, initiate discussions or allow members of the community to ask questions that will be visible to everyone within the community. Any community member can create a new post in the forum or respond to previous posts.

To create a community forum:

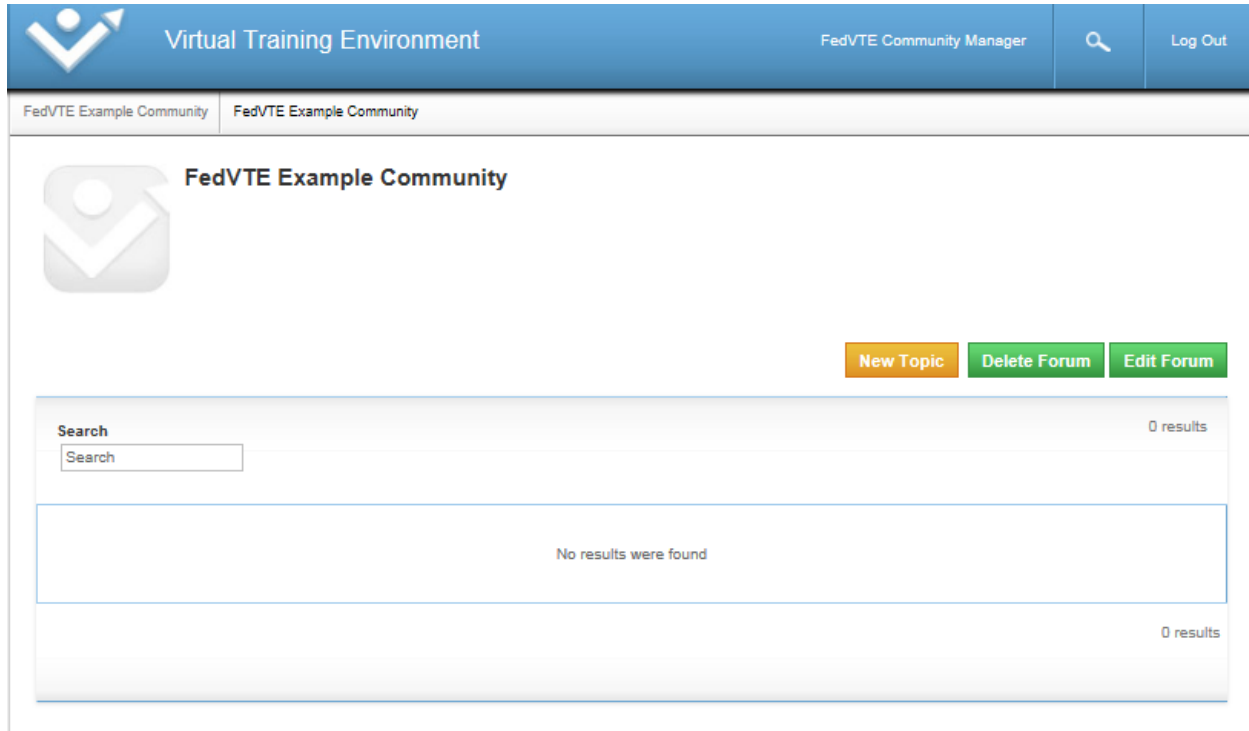
1. Click the Virtual Training Environment text in the panel at the top of the screen to return to the home page.
2. Click the community name link next to the My Community label.
3. In the Community section of the Action Panel, under Forum Management, click *Create Forum*.

**Note:** the *View Forum* link will only be visible if a forum has already been created.

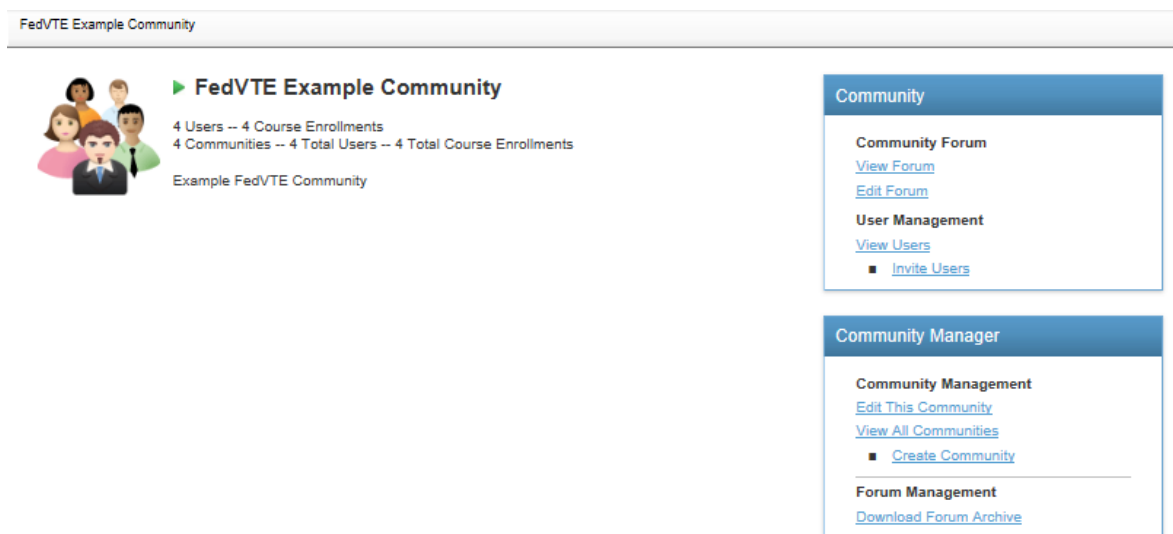


4. A pop-up message will confirm that the forum has been created. Click the X in the upper-right corner of the pop-up window to close it.

You will be at the newly created forum screen.



The *Edit Forum* button will allow the CM to change the default name and description of the forum. Once the forum is created there will also be an *Edit Forum* link along with *View Forum* in the Community task box.



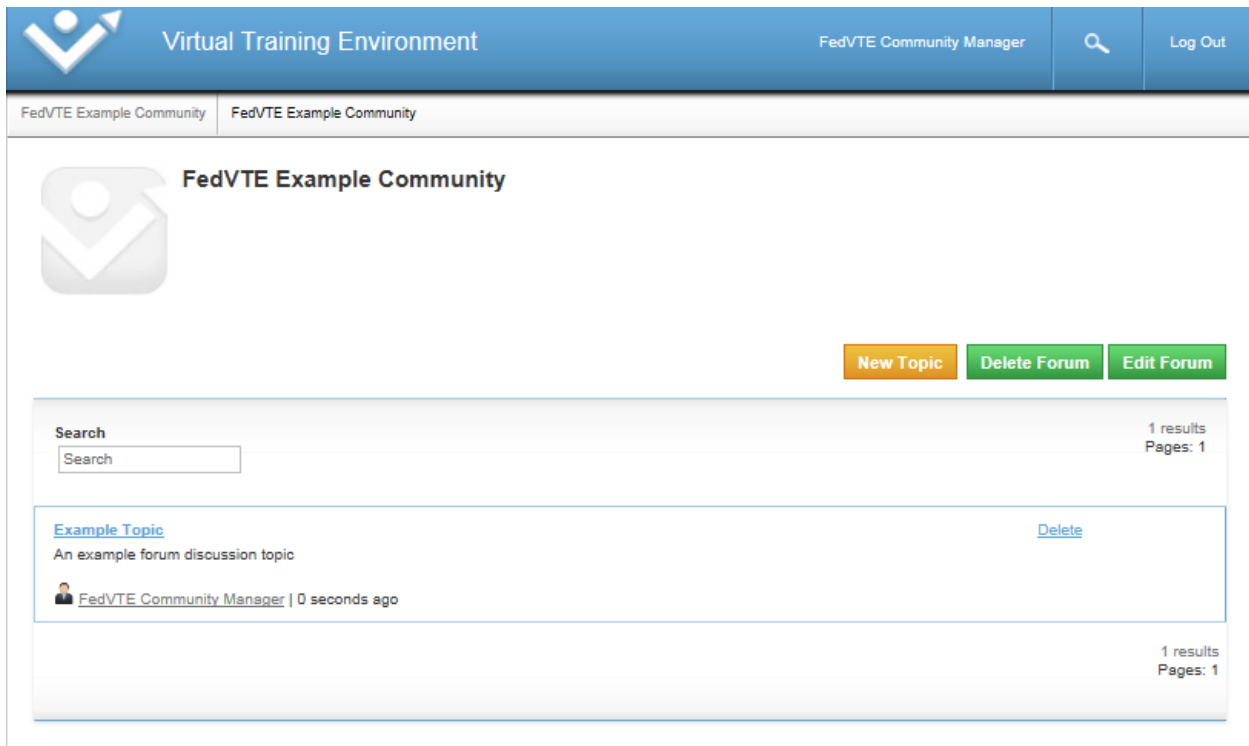
## 3.6 Deleting Forum Items

Community Managers have the ability to delete individual posts to the community forum as well as the forum itself. To delete a community forum

1. Open the community home screen by clicking the community name link next to the My Community label on the home screen.
2. Click the *View Forum* link in the Community section of the Action Panel.
3. When the community's forum screen opens, click *Delete Forum* and click *Delete* when asked to confirm you want to delete the forum.

To delete an individual post to a forum

1. Open the community home screen by clicking the community name next to the My Community label on the home screen.
2. Click the *View Forum* link in the Community section of the Action Panel.
3. When the community's forum screen opens, locate the post to be deleted, and click the Delete link next to it.



The screenshot shows the 'Virtual Training Environment' (VTE) Community Manager interface. The header bar includes the VTE logo, the text 'Virtual Training Environment', and a 'FedVTE Community Manager' link. Below the header, there's a search bar and a 'Log Out' button. The main content area displays 'FedVTE Example Community' with a search bar and a 'Delete Forum' button. A forum post titled 'Example Topic' is shown with a 'Delete' link next to it.

4. Click *Delete* when asked to confirm you want to delete the post.



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## 3.7 Download Forum Archive

Once a community forum has been created, there will be an option to download the forum's archive of questions, discussions and responses. To export the forum to an XML file

1. On your community's home screen, click the *Download Forum Archive* link under Forum Management in the Community Manager section of the Action Panel.

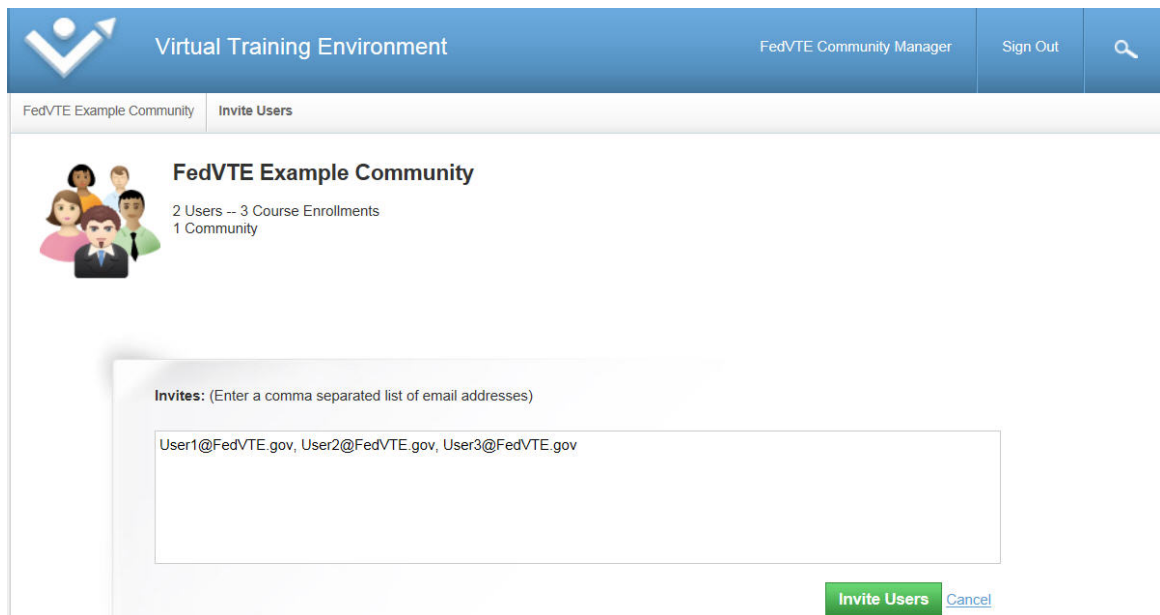
Note: This option is only available if a forum has been created for this community and the user has the CM role.

## 4 MANAGING USERS IN THE COMMUNITY

Each user of FedVTE is a member of only one community, which means that the system allows for distributed user management – each Community Manager manages users that are members of his/her community.

### 4.1 Invite Users to Join Your Community

1. Click the Virtual Training Environment text in the panel at the top of the screen to return to the home page.
2. In the Dashboard section of the Action Panel, under User Management, click *Invite Users*.
3. The Invite Users screen opens where you enter the email address/es of users you want to invite to your community, separated by commas.



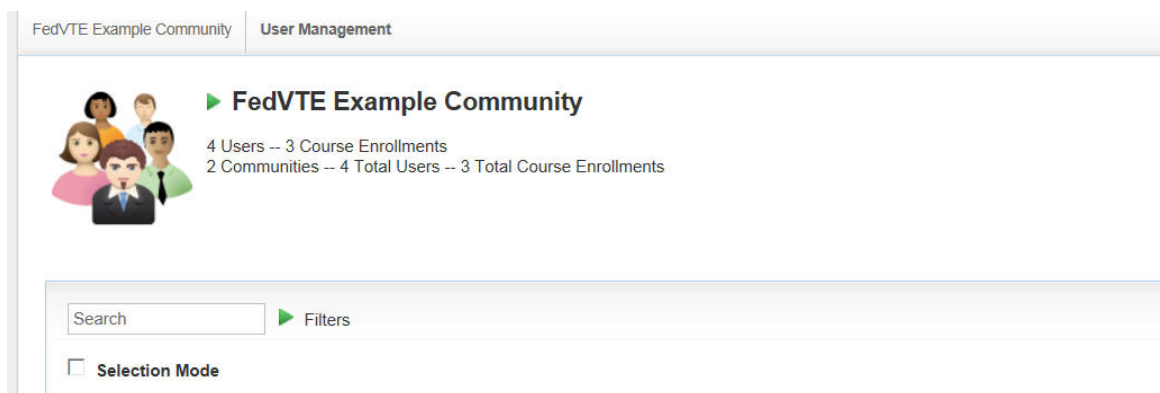
4. Click *Invite Users*.
  - If your invitee is already a FedVTE user, s/he will receive an email notifying them of your invitation. When the user clicks the link in the invitation email and logs in to FedVTE, s/he will be a member of your community.
  - If your invitee is not already a FedVTE user, s/he will receive an email inviting them to join FedVTE. When the user clicks the link in the invitation email, s/he will be brought to the site registration page and become a member of your community after entering registration information.

Tip: The *Invite Users* link is also available on the community's home page accessible by clicking the community name link next to the My Community label on the TA's home page.

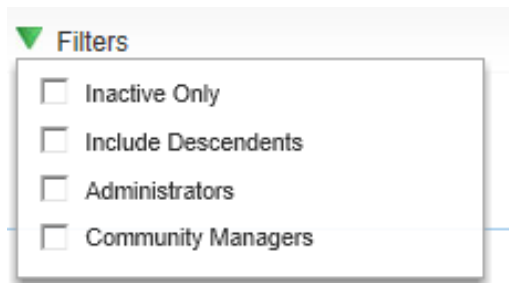
## 4.2 Assign Users to a Community Individually

Community Managers can assign users to a community without sending an invitation email. Once a CM moves a user to a new community, the user will be a member of that new community when they next login to the system.

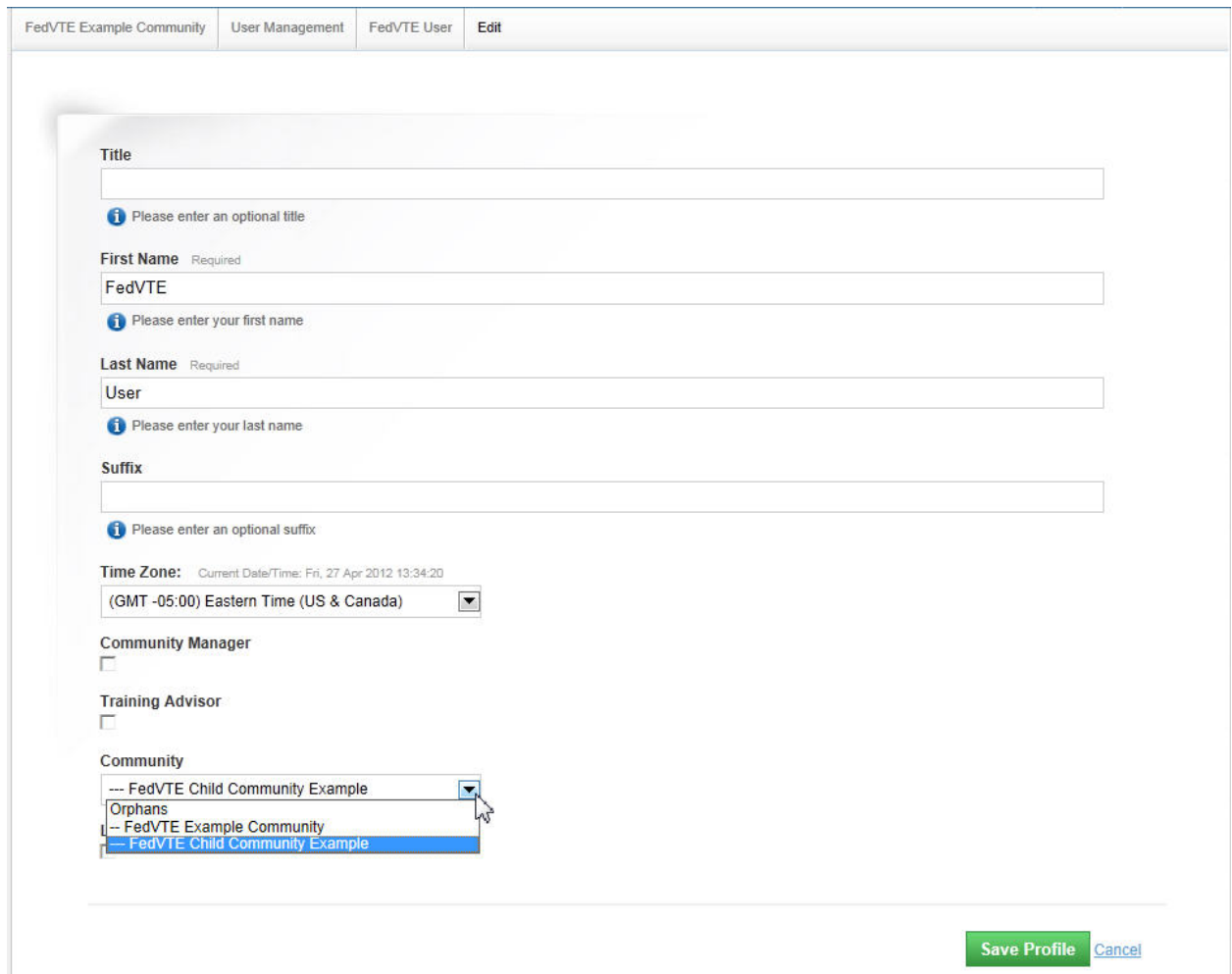
1. Click the Virtual Training Environment text in the panel at the top of the screen to return to the home page.
2. In the Dashboard section of the Action Panel, under User Management, click *View Users*.
3. The User Management screen opens listing users in your community.



4. To locate users that are in child communities (descendants), or other specific criteria, click the green arrow next to the Search box to expand the filter.



5. Once you've located the user you want to assign, click *Edit User* next to his or her name to open the Edit User screen.



FedVTE Example Community > User Management > FedVTE User > Edit

Title

Please enter an optional title

First Name Required

FedVTE

Please enter your first name

Last Name Required

User

Please enter your last name

Suffix

Please enter an optional suffix

Time Zone: Current Date/Time: Fri, 27 Apr 2012 13:34:20

(GMT -05:00) Eastern Time (US & Canada)

Community Manager

Training Advisor

Community

--- FedVTE Child Community Example

Orphans

-- FedVTE Example Community

-- FedVTE Child Community Example

Save Profile Cancel

6. Select the community to assign the user from the Community drop-down list.
7. Click *Save Profile* to save your changes.



## 4.3 Edit, Designate, or Assign a Single User

FedVTE allows CMs to edit an individual community member's profile information, roles they have in the community, and their community membership.

1. Follow the *Assign Users to a Community Individually* directions above to access the User Edit screen.

The CM can edit the following user information:

- **Title, First Name, Last Name and Suffix** – Add or edit the user's title, first name, last name and/or suffix
- **Time Zone** – Select the user's time zone from the drop-down list

The CM can assign the following community roles to a user:

- **Community Manager** – Click this box to designate this user a Community Manager for their community
- **Training Advisor** – Click this box to designate this user a Training Advisor for their community

The CM can assign a user to a new community

- **Community** – Select the community you want the user to be a member of

Finally, the CM may control a user's access to the system.

- **Locked** – Check this box to lock this user's account from accessing the system, or uncheck it to unlock the account

2. Click *Save Profile* to save your changes.



## 4.4 Edit, Designate, or Assign Multiple Users

In addition to allowing CMs to edit individual members' records, FedVTE also allows CMs to change the roles, community assignments, and locked/unlocked status of multiple users at once.

1. Click the Virtual Training Environment text in the panel at the top of the screen to return to the home page.
2. In the Dashboard section of the Action Panel, under User Management, click *View Users* to open the User Management screen for your community.
3. Check the *Selection Mode* check box.
4. Use the search box and filters to locate the users you want to edit.
5. Click the *Select* button next to the users you wish to include.

FedVTE Example Community | User Management

**FedVTE Example Community**  
 3 Users -- 0 Course Enrollments  
 2 Communities -- 3 Total Users -- 0 Total Course Enrollments

Search  **Filters**

☒ Selection Mode

☐ Inactive Only  
☐ Include Descendents  
☐ Administrators  
☐ Community Managers

**Selected Users** **Continue**

Training Advisor  
 mabaker+fa@hert.org  
 Member of FedVTE Example Community  
 Training Advisor

FedVTE Example User  
 ivdiricco+2@cert.org  
 Member of FedVTE Example Community  
 Community Manager

Community Manager  
 mabaker+cm@cert.org  
 Member of FedVTE Example Community  
 Community Manager

3 results  
Pages: 1

3 results  
Pages: 1

When you click the *Select* button, the user's name is added to the list just to the right of the filters. Clicking the red delete symbol removes that user from part of your selection.

6. Once you've selected all the users you want to edit, click *Continue*.

7. The Edit Multiple Users screen opens.

Edit Multiple Users

Update field	Set field for all users to:
<input type="checkbox"/>	Community -- FedVTE Example Community
<input type="checkbox"/>	<input type="checkbox"/> Community Manager
<input type="checkbox"/>	<input type="checkbox"/> Training Advisor
<input type="checkbox"/>	<input type="checkbox"/> Locked

[Update All Users](#) [Cancel](#)

Editing Users

2 users selected  
Community Manager  
Training Advisor

[Change Selection](#)

In the sidebar on the right, you can see the list of users you are editing and can change the list if desired by clicking the *Change Selection* link.

8. To update a field, select the *Update Field* checkbox next to the item you would like to set. This allows the field to be edited. In this example, the community for 2 users is being changed, and they are both being assigned the Training Advisor role.

Edit Multiple Users

Update field	Set field for all users to:
<input checked="" type="checkbox"/>	Community --- FedVTE Child Community Example
<input type="checkbox"/>	<input type="checkbox"/> Community Manager
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Training Advisor
<input type="checkbox"/>	<input type="checkbox"/> Locked

[Update All Users](#) [Cancel](#)

Editing Users

2 users selected  
Community Manager  
Training Advisor

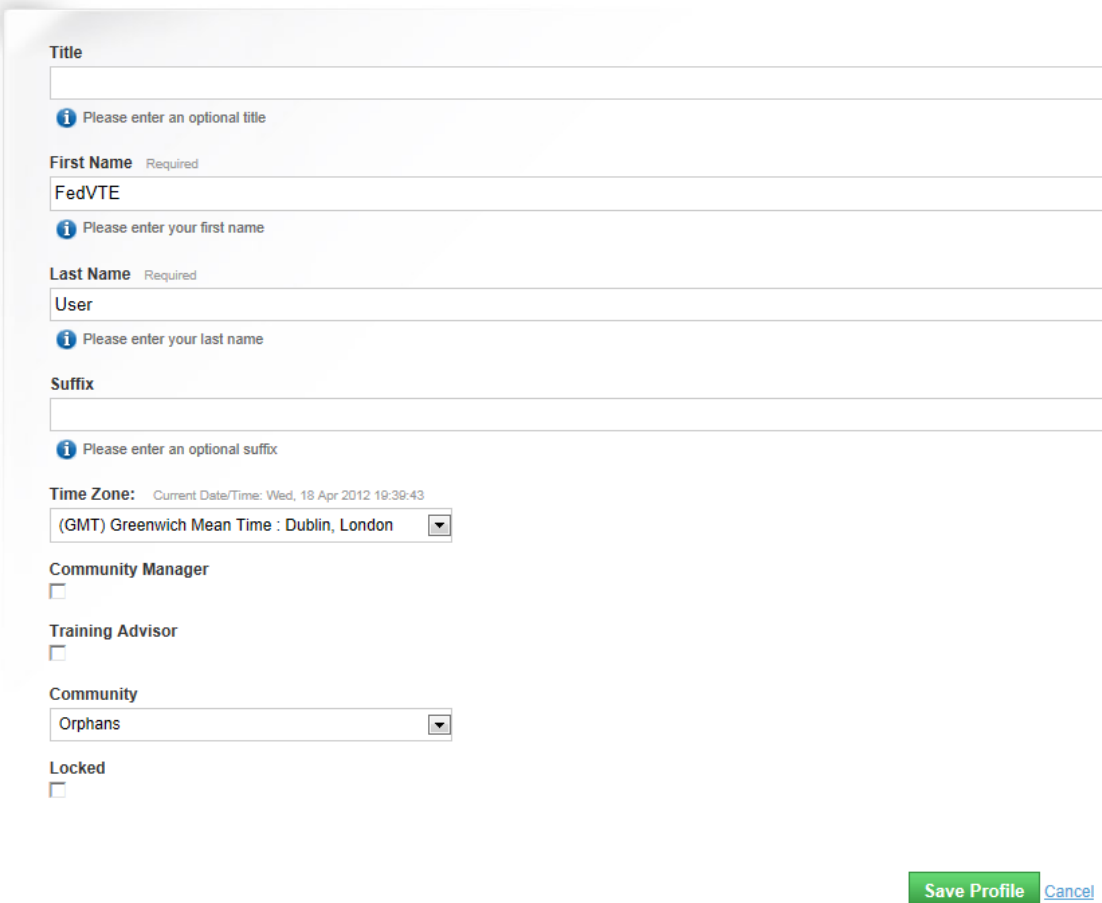
[Change Selection](#)

9. Click *Update All Users* to save your changes.

## 4.5 Removing a User from a Community

User/s may be removed from communities without being removed from the system. These users will be placed in the Orphans community. They will still have access to training assets and their training record; they will just not be a member of a community until their account is reassigned to one.

1. To remove a user from your community, follow the directions above to edit a user or edit multiple users. At the edit user screen, in the Community drop down list, choose *Orphans*.



The screenshot shows a user profile edit form. It includes fields for Title, First Name (FedVTE), Last Name (User), and Suffix. There are informational icons and prompts for each field. Below these fields are checkboxes for 'Community Manager', 'Training Advisor', and 'Locked'. A 'Community' dropdown menu is set to 'Orphans'. At the bottom right, there are 'Save Profile' and 'Cancel' buttons.

2. Click *Save Profile*.

When you return to your home screen and choose *View Users* from the Dashboard section of the Action Panel, you will no longer see the user listed.

Important: Once moved, users in the Orphans community may no longer be accessible. Only an Administrator can update those user profiles. However, a CM of any community can still invite those users to join their own community.



## 4.6 Lock and Unlock User Accounts

If a user account has been locked out, or the CM wishes to lock a user account, the CM may do so in a few different ways.

To lock or unlock a user account

1. From the CM's home page, click the *View Users* link in the Dashboard under User Management.

This will open the User Management window listing all users in the community. Use the filters to assist in locating users.

2. Click either the *Lock* or *Unlock* link next to the desired user.

FedVTE Example Community | User Management

**FedVTE Example Community**  
4 Users -- 4 Course Enrollments  
4 Communities -- 4 Total Users -- 4 Total Course Enrollments  
Example FedVTE Community

Search:   
Selection Mode: ☐  
Filters: ☐ Inactive Only, ☒ Include Descendents, ☐ Administrators, ☐ Community Managers

4 results  
Pages: 1

 <a href="#">FedVTE Training Advisor</a> <a href="#">mabaker+ta@cert.org</a> Member of FedVTE Example Community Training Advisor	<a href="#">Edit User</a> <a href="#">Lock</a>
 <a href="#">FedVTE Community Manager</a> <a href="#">mabaker+cm@cert.org</a> Member of FedVTE Example Community Community Manager	<a href="#">Edit Profile</a>
 <a href="#">FedVTE Example User</a> <a href="#">mabaker+u1@cert.org</a> Member of FedVTE Example Community	<a href="#">Edit User</a> <a href="#">Unlock</a>
 <a href="#">FedVTE User1</a> <a href="#">mabaker+u2@cert.org</a> Member of FedVTE Example Community	<a href="#">Edit User</a> <a href="#">Lock</a>

The other way to change a user's account status is through the Edit User screen. An option to Lock or Unlock the profile will be displayed depending on the account's current status.

Finally, if you click the user's name link from the User Management screen, the user's detail page will open where a *Lock* or *Unlock* link will be available in the User Management task box.





## 5 CONTACT

To report a problem or provide other feedback, click the *Feedback* link at the bottom of the FedVTE window or send email to [FedVTE-Support@cert.org](mailto:FedVTE-Support@cert.org).

Please detail as much information as possible including the specific system element(s) involved (community, course, content piece, etc.) and any error messages you may have received.